

Chapter 1: Planning

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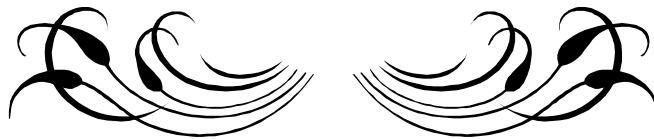
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INTRODUCTION

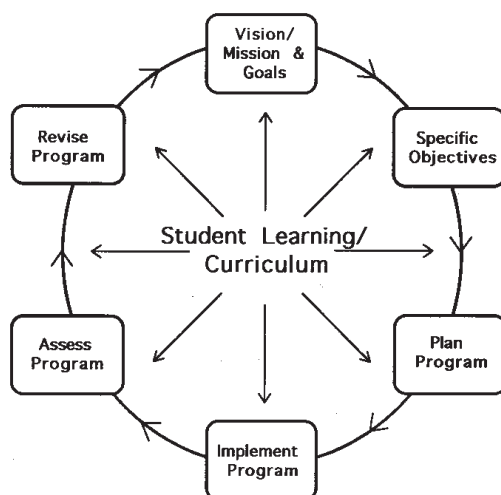
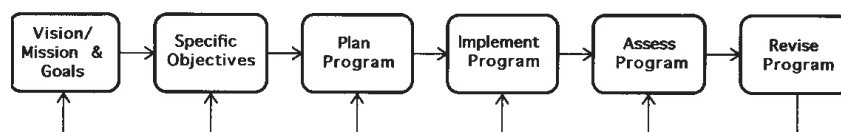
Planning is a crucial element in establishing richly endowed libraries. It is the first step in designing a new or improving an existing school library media program. Planning

“is a continuous process, rather than a single step or one-time project, and is subject to ongoing evaluation and revision. Successful planning requires the allocation of adequate time and resources and the establishment of a realistic timetable. It also requires that the purposes for planning and the outcomes expected be established and clearly articulated. Information and recommendations from previous planning and evaluation efforts must be reviewed early in the process.” (AASL 44)

To ensure the successful connection between technology and curriculum, between services and resources, and between program and personnel, media specialists must be aggressive in the planning, designing, delivery, and evaluation processes. Planning should be a collaborative effort among other library media professionals, support staff, administrators at both the district and building levels, students and teachers, and community groups such as parents, school board members and various school advisory committees.

Although there is no single “best” method of planning, the use of a planning model is suggested. The school library media specialist, in collaboration with faculty and administrators, should participate in selecting the model as well as in the planning itself. Following is a sample model from *Information Connections* (Minnesota 54).

SAMPLE PLANNING MODELS



MISSION STATEMENT

All planning is guided by the mission statements of the school and the library media center. A mission statement articulates the overriding philosophy of an organization. It is broadly worded and is widely agreed to by all parties associated with the organization. The mission statement serves as a reference point for the development of goals, objectives, and activities. The library media center's mission statement reflects the philosophy of the school just as the school's mission statement reflects the district philosophy. For example, "The mission of the library media program is to ensure that students and staff are effective users of ideas and information." (AASL 1) The mission statement, goals, objectives, and activities also provide a means for continuous evaluation and assessment.

PLANNING PROCESS

■ Needs Assessment

To determine user needs, information is collected from students, faculty, and administrators. This assessment assists in establishing priorities of the library media program and serves as a valuable tool for formulating long- and short-range goals. Surveys may be comprehensive or may address only one or two aspects of the program. Data from these surveys identify successful services, ineffective services, and new services to be added to the program. Survey data also provide statistics and concrete evidence of the support and justification for programs. Documentation should be retained for use in the Missouri School Improvement Program (MSIP) evaluation. (See samples of surveys in Chapter 7 and Appendix F)

■ Goals Development

Information age curricula demands the careful development of an effective library

media program that can grow and adapt as needs change. Development of long- and short-range goals and objectives helps articulate an effective course of action. A three-year plan is a tool that organizes long-range goals and should include the following components:

- program management;
- staffing needs;
- staff development and inservice opportunities;
- integration of information literacy skills;
- incorporation and upgrading of new technologies;
- collection management and development; and
- evaluation of the physical facilities.

Short-range goals emerge from the broader long-range goals but can usually be accomplished within the current school year.

■ Implementation

The library media specialist must collaborate with staff and administration to help ensure that goals and objectives are developed and that the program moves forward with a plan of action. Planning includes decisions about budgeting, staffing, facilities, services, and resources (including print, nonprint, equipment, emerging technologies, and remote access). When implementing the plans, the library media specialist continually communicates with all parties involved.

■ Evaluation

Evaluation is an on-going process which involves a periodic review of the mission statement and goals to determine their validity and to assess the progress being made in each goal area. Once a comprehensive evaluation method and plan is in place, it can be implemented on a year-to-year basis incorporating changes as needed.

Evaluation can be formal or informal. Some examples include: informal feedback from staff, students and administrators; and input from an advisory committee. Statistics gathered from a written survey; and administrators' evaluations are more formal. Documentation of evaluation activities should be retained for use in the Missouri School Improvement Plan (MSIP) evaluation.

It is recommended that the library media specialist submit reports on a periodic basis, as well as an annual report to the advisory committee, administrators, and school board. This report can be presented in a variety of formats and styles (e.g., written, electronic and/or multimedia presentations, video, charts, graphs, scrapbook).

An annual report should include:

- introduction (including mission statement);
- description of the program;
- review of goals;
- summary of the year's LMC activities;
- data from the planning and evaluation worksheet for Missouri school LMCs;
- statistical data including:
 - budget summaries,
 - circulation statistics, and
 - inventory;
- program recommendations which includes budgets, resources, equipment, personnel, and space; and
- professional activities.

POLICIES AND PROCEDURES MANUAL

MSIP mandates that formal policies including selection, circulation, information access, gifts, collection development, copyright, and confidentiality must be adopted at the district level. *Information Power* outlines the

importance of policies and procedures through the following statement:

“In all cases, ... policies and procedures are designed to ensure maximum access to the full range of information resources and services for students and staff. Policies and procedures must be clearly articulated and widely communicated to the school community” (49).

Frequent review of and adherence to these policies at all levels is critical to the success of the library media center program. (See samples of board of education policies in Appendix H)

BUDGET DEVELOPMENT

Access to timely and relevant resources requires consistent and adequate funding. Collection development is more than purchasing materials from year to year; it is a long-term undertaking to ensure that all components of the collection are given consistent attention. Effective collection development practices also guard against obsolescence of resources. Budget projections allow for flexibility in enrollments, changes in curriculum and instructional strategies, technological advancements, inflation, and other relevant factors. Budgetary projections must allow for replacement of lost, stolen, and obsolete items in addition to providing for collection growth and development .

A budget is a planning document which states the library media center's funding needs and anticipated sources of income. The process of budget development involves identifying program goals, objectives and activities. Justification for funding should be stated in terms of how learning goals and objectives for the total school's instructional program are realized through the library media

center. Under no circumstances should the library media specialist be required to administer the program without participating in the budgeting process.

Collection development is more than purchasing materials from year to year; it is a long-term undertaking so that all components of the collection are given consistent attention.

The library media specialist prepares an annual budget based on current services, documented needs, goals, and the consideration of state standards and national guidelines. Standards are reflected in the Missouri School Improvement Program (MSIP), the *Standards for Missouri School Library Media Centers*, the *Show-Me Standards* (72 performance and knowledge standards all students in Missouri should achieve before graduation from high school), and *Information Power* (national guidelines developed by the American Association of School Librarians and the Association For Educational Communications and Technology). Preliminary budgets should be developed three years in advance and shared with administrators for long-range planning. The library media specialist could conceivably work with information from several budgets simultaneously, including:

- analysis of expenditures from past budgets;
- expenditures from the current budget;
- final refinements and justification of the budget for the immediately ensuing fiscal year;
- early refinements of the budget for the following year; and
- needs assessment data for the projected budgets.

When planning a budget many factors should be considered that are not limited to the library media center environment but encompass the entire instructional program. It is vitally important that the library media specialist know about or be involved with the instructional program of the entire school in order to access the impact on the library media program's budget. Some of the factors to be considered are:

- curriculum integration;
- promotion of literacy;
- variety of instructional strategies;
- diversity of student populations;
- usage patterns;
- educational trends;
- future service projections;
- electronic information access;
- electronic catalogs and circulation;
- subscriptions and contracted services;
- professional materials;
- interlibrary loan;
- supplies;
- professional growth through attendance at meetings and conferences; and
- special programming efforts.

Funds for the acquisition or repair of equipment, furnishings, salaries, textbooks, workbooks, and classroom collections should not be included in the library media center budget. It is important for the library media specialist to submit a separate budget listing needs for capital outlay funding for such items as equipment and furnishings. (See sample budget forms in Appendix G)

It is recommended that library media center expenditures be at least 1% of the state average per eligible student expenditure, as reported annually by DESE to school districts (Missouri, Standards 38).

Tracking expenditures by line-item is a management function that helps in budget development, decision making, determination of priorities, and documenting progress toward goals. Expenditure records maintained by the library media specialist should be reconciled with district central office accounting records and should be available for review by members of the MSIP visitation team. Separate records should be maintained for each account (e.g., board allocated funds, grants, revolving accounts, and others). It is highly recommended that the library media specialist use the districts line-item category codes to develop budgets and track expenditures. For example, some districts use 6440 as the

expenditure code for books and non-print resources and 6450 for periodical expenditures. Line-items, however, should be flexible to accommodate unforeseen contingencies which might be as simple as reallocating funds from one category to completely revising the budget due to a major disaster or unforeseen windfall. The library media specialist should be alert to funding opportunities from federal, state, local and private sources; however, external funding, including federal funds, grants, business partnerships, endowments, gifts, user fees, free-text funds, parent-teacher organizations, and other external funding sources cannot supplant local board allocations.

“Media management is the process from which all programs of the school library media center emerge. It is through effective and creative management that goals, programs, and priorities of the library media center are identified and administered. It provides the opportunity for the library media programs to function at the highest possible level as an integral part of the school.”

(Colorado 45)

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